



Special Districts Retention Schedule (SD)
Indiana Commission on Public Records – County Records Management

DATE APPROVED BY THE OVERSIGHT COMMITTEE ON PUBLIC RECORDS: JUNE 23, 2010	NAME OF COUNTY ADOPTING RETENTION SCHEDULE:	DATE ADOPTED BY THE COUNTY COMMISSION OF PUBLIC RECORDS:
DIRECTOR/STATE ARCHIVIST, INDIANA COMMISSION ON PUBLIC RECORDS <i>SIGNATURE</i>	PRINTED NAME: Jim Corridan	
CHAIRPERSON OF THE COUNTY COMMISSION OF PUBLIC RECORDS: <i>SIGNATURE</i>	PRINTED NAME:	
SECRETARY OF THE COUNTY COMMISSION OF PUBLIC RECORDS: <i>SIGNATURE</i>	PRINTED NAME:	

THIS SCHEDULE MAY BE USED ONLY AFTER ADOPTION BY THE COUNTY COMMISSION OF PUBLIC RECORDS.

Instructions:

1. Records listed on this schedule may be destroyed upon completion of a *Notice of Destruction, State Form 44905* and distribution of copies of the form to the Clerk of the Circuit Court of the County and to the INDIANA COMMISSION ON PUBLIC RECORDS, 402 West Washington Street W472, Indianapolis, IN 46204.
2. **Officials should first reference this office-specific retention schedule.** If the form/record series you're looking for is not listed, refer to the general retention schedule (GEN)
3. All records **not listed** on these approved schedules can be destroyed or transferred only by completing a *Request for Permission to Destroy or Transfer Certain Public Records (PR-1), State Form 30505*, and by obtaining approval of the COUNTY COMMISSION OF PUBLIC RECORDS and the INDIANA COMMISSION ON PUBLIC RECORDS.

GUIDELINES:

Permanent records may be maintained either in the original format or on microfilm that meets standards outlined in 60 IAC 2 or Administrative Rule 6 (Court Records).

Microfilmed records may be deposited or transferred according to the retention period outlined for that record.

Security/original rolls of microfilm to be stored offsite in secure location. Duplicate rolls for office use.

Electronic records and computer printouts that include data from more than one (1) form must be retained for the longest retention period for all included forms.

Any STATE BOARD OF ACCOUNTS forms approved for use in lieu of prescribed forms are subject to the same retention requirements.

The **Special Districts General Retention Schedule** has been prepared in accordance with the STATE BOARD OF ACCOUNTS *Accounting and Uniform Compliance Guidelines Manual for Special Districts* for use by the following entities:

1. Conservancy Districts
2. Regional Water, Sewage And Solid Waste Districts
3. Solid Waste Management Districts
4. Fire Protection Districts
5. Airport Authorities
6. Public Transportation Corporations
7. Regional Planning Commissions
8. Other Special Districts, Such As Port Authorities, Flood Control Districts, Building Authorities, Fire Protection Territories, Water Authorities or any other district required to follow state statutes and audited by the State Board of Accounts.

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Adopted June 23, 2010 by the Oversight Committee on Public Records/Indiana Commission on Public Records

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RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
BOOKS, LEDGERS, REGISTERS AND JOURNALS		
SD 10-1	BOND REGISTER Form 53	DESTROY six (6) calendar years after completion of project and after receipt of STATE BOARD OF ACCOUNTS Audit Report.
SD 10-2	Form 358 – Ledger of Receipts, Disbursements and Balances Form 359 – Ledger of Appropriations, Encumbrances, Disbursements and Balances	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.
UTILITY FORMS		
SD 10-3	Form 302 – Water Utility Voucher Register (short form) – Class A and B Form 303 – Water Utility Voucher Register (long form) – Class A and B Form 304 – Water Utility Journal (Class C) Form 309 – Wastewater Utility Journal	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.
SD 10-4	Form 313A – Water and Sewage Utility Register of Cash Receipts-Consumers Form 313C – Water and Sewage Utility Combined Register of Daily Cash Receipts-Consumers	DESTROY after four (4) calendar years and after receipt of STATE BOARD OF ACCOUNTS Audit Report and satisfaction of unsettled charges.
SD 10-5	Form 314 – Guarantee Deposit Register Form 319 – Water Utility Simplified Cash Journal (Class C) Form 321 – Consumer's Ledger – Water Utility Form 322 – Consumer's Ledger – Municipal Water and Sewage Utility Combined) Form 323 – Simplified Cash Journal – Municipal Sewage Utility Form 324 – Consumer's Ledger – Municipal Sewage Utility Form 330 – Revenue Register – Water and Wastewater (Class A and B) Form 331 – Expense Register – Water and Wastewater (Class A and B)	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.
ASSET INVENTORY		
SD 10-6	Form 315A – Inventory Sheet	DESTROY after four (4) calendar years and after receipt of STATE BOARD OF ACCOUNTS Audit Report and satisfaction of unsettled charges.
SD 10-7	Form 369 – General Fixed Asset Account Group	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.
SD 10-8	Form 100R – Certified Report of Names, Addresses, Duties and Compensation of Employees	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.

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SD 10-9	SCIENTIFIC OR ENGINEERING RECORDS/ LABORATORY BENCH SHEETS AND OPERATION DATA Daily and monthly records.	DESTROY three (3) calendar years after information has been transferred to data summary sheet or final report.
SD 10-10	SCIENTIFIC OR ENGINEERING RECORDS/DATA SUMMARY SHEET/FINAL REPORT Annual summary records.	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.
SD 10-11	SCIENTIFIC OR ENGINEERING RECORDS/LAND AND OPERATION DATA Daily and monthly reports.	DESTROY three (3) calendar years after information has been transferred to final report.
SD 10-12	SCIENTIFIC OR ENGINEERING RECORDS/ LAND AND OPERATION FINAL REPORTS Annual summary reports.	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA COMMISSION ON PUBLIC RECORDS.

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